

## Devoted Health Agent Portal Quick Start Guide

The **Devoted Health Agent Portal** is built from the ground up to make selling Devoted quicker and easier!

### The Basics

#### What's in it for you?

- The best online application experience for selling Devoted plans
- One place to view all your Devoted business
- Links to essential tips, advice, and other resources for selling Devoted
- Digital signature workflows for Scope of Appointment and other forms

Plus, the portal will eventually become your one-stop shop for all agent activities. For those of you who sold with us in the past, the portal replaces Connecture.

#### When can I access the Portal?

If you're **Ready to Sell** with Devoted, you'll be receiving an invitation to access the Agent Portal soon.

#### How do I log in?

The first time you log in, look for an email in your account with the subject line of "Devoted Agent Portal Log-in Details". This email includes an invite link that you can click to create a password for your account. Your username is your NPN number.

After that, you can access the portal at any time by going to <https://agent.devoted.com/> and entering your username and password. <https://agent.devoted.com/>

#### Help! I forgot my password

Forgot your password? No problem! Just go to <https://agent.devoted.com/>, click Login, then click "Don't remember your password?" Enter your email and hit the "Send Email" button. You'll receive a message in your Email inbox with a link - click it to create a new password and sign into the portal.

#### What can I do in the portal?

You can access the following tools within the Agent Portal:

- From the **Home Page**, you can check your Ready to Sell status and access important sales tools, training, support, and education resources
- Send out a digital **Scope of Appointment** forms via email for Digital Signature
- Quickly create and submit a new **Enrollment Application** online, whether you're in person with a prospective member or on the phone

- Check the status of all your **Devoted Applications** - soon you'll be able to view all your applications regardless of submission method
- View important information about all of your **Devoted Contacts** in one place - prospective members you're selling to and members you've signed up with Devoted

Check back often to see what features we add in the future - we'll be updating and improving your portal experience frequently!

## Tips and Tricks

### Creating an Application

You can quickly create an Application from the **Home Page** or **Applications** page by clicking the "Start Application" button. Once you've filled out the **New Application** page, a Contact record will automatically be created for the application, and you can continue to complete the application.

### Submitting an Electronic Scope of Appointment (SOA)

You send an applicant a Scope of Appointment form in a few different ways:

- From the Contacts page, click on the Prospect tab. Click "... " in the Actions column by the relevant Contact and select "New SOA". The Electronic SOA form will launch.
- From within an existing Contact (after you start an Application), click the "SOA" tab and choose the method you want to use.
- Choose the Electronic Scope of Appointment option to send your contact an email with a link to complete an electronic version of Devoted's SOA form.

### Choosing a Plan

On the **Plan** page of the Application, enter the plan year and applicant's zip code to quickly filter down the list of Plans to quickly help you choose the correct one.

### Selecting a PCP

On the **Providers** page of the Application, you can select the preferred PCP for an applicant. A few tips:

- Use the [PCP Search tool](#) on devoted.com to quickly find the best PCP for your applicant.
- Copy the PCP's NPI number from the **PCP Search tool** into the PCP field on the **Providers** page of the application, then choose the relevant office location.
- If the applicant does not have a PCP preference, click the checkbox that says "If applicant has no PCP preference, check this box and a Devoted guide will help assign one."
- *Note: if you do not select a PCP, you must click the checkbox above to proceed through the application.*

### Application Signatures

On the **Sign & Submit** page, you have a number of options for documenting the applicant's signature depending on the submission method.

- *In Person Electronic:* Click the “Sign Application” button to open an Application Signature form - show this form to the applicant on your device and ask them to complete the form and sign themselves.
- *Phone, Unrecorded Line:* The applicant will need to complete a telephonic signature with Devoted; you can read the prompt displayed on the Enrollee Signature section of the page. Inform the beneficiary that because this is an unrecorded conversation, they will need to complete this step over the phone on a recorded line. Someone from Devoted Health will call them within the next 2 business days. That call will count as their verbal "signature."
- *Phone, Recorded Line:* If you're on a recorded line, you can read the content displayed in the Enrollee Signature section on the page and ask them for a verbal signature. Your call recording is proof of the applicant's signature.

#### **Other Application Tips**

- You can add multiple Enrollment Reasons on the **Health & Financials** page
- If the applicant has more than one Enrollment Reason, you can indicate the preferred Enrollment Period via the Preferred Enrollment Period dropdown on the **Application Details** page.
- The Proposed Start Date on the **Application Details** page indicates the preferred Enrollment Date of the applicant. The final Effective Date will be determined when the application is accepted by CMS.
- You can upload supporting documentation and forms via the Add File Attachment button on the **Application Details** page.
- Use the Transition Details field on the **Sign & Submit** page to let us know about any information you think will be helpful for the applicant's member onboarding.